

User Guide

AlineaSol

Reports 4.4 v1

Version: 1
Date: 02/04/2015

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1 Introduction

This document is the user guide to AlineaSol's Reports (Asol Reports) module for SugarCRM. The guide covers release 4.X, and is updated up to 4.4.

AlineaSol Reports is part of a family of modules that AlineaSol has developed on top of the SugarCRM base. These modules include:

Module	Community	Enterprise
AlineaSol Reports	V	V
AlineaSol Work Flow Manager	V	V
AlineaSol Blue Theme		V
AlineaSol Projects	V	V
AlineaSol Publish Home Page	V	
AlineaSol Chat (note 1)	V	

Note 1: will be published end of March 2015.

Both community and enterprise editions have regular new releases. The enterprise versions include direct support from AlineaSol.

Asol Reports have been tested and run on both CE and Professional versions of SugarCRM. As with all AlineaSol modules, MySQL is required as database.

AlineaSol Reports Community focusses on the capability to quickly create nice looking reports with a minimum of fuss. Both table and graphical output is offered (also combined). Various graphical engines are supported, including by-default NVD3/D3, which offers transitions and interactions.

AlineaSol Reports Enterprise introduces more tools and facilities to meet the demands of users who want to have more control and potentially want to integrate with external databases and applications.

This User guide covers both versions.

As of AlineaSol Reports 4.4, SugarCRM 7.5 is supported. Note that there are currently some (small) limitations compared with SugarCRM CE (see readme for "known-issues").

Note that this is not an administration guide. See currently “Readme” notes in package for administration, configuration and a considerable number of advanced options.



2 Comparison Community and Enterprise versions

	Community	Enterprise
General		
Report Editor	v	v
Support for Dashlets	v	v
Multi-module reports	v	v
Programmable reports	v	v
Auto delivery via email	v	v
Export xls, csv, pdf, html	v	v
Role based access	v	v
Compatible with AlineaSol Publish Home Page	v	v
Tables and Graphics	v	v
Multiple graphical engines	v	v
Intelligent graphics with transitions	v	v
Extensive set of graphs	v	v
Interactive reports, dynamic filters	v	v
Filters with complex logical constructs	v	v
User Definable CSS	v	v
Output processing		
Advanced math functions	v	v
Force format on output	v	v
CSS for each report (1)		v
Post DB query processing (in php)		v
Integration with external systems		
Access to external Databases		v
Connects to remote apps using http(s)		v
Grid (1)		
Multiple graphs in Grid		v
Multiple tables in Grid		v
User inputs in grid		v
Enhanced presentation options		
Multiple graphs in one view		v
Multiple y-axes		v
User definable colour palette		v
Advanced customisation graphs		v
Additional Graph Package		v
Insert Report in any view via Studio		v
Click-through in tables		v

Definable action buttons in reports		v
Define fields as clickable extra info		v
Extras		
Access to Report Library		v
Preview SQL(1)		v
Support	Community	Email/Web (1)

Note 1: certain enterprise features are made available in the first half of 2015.



3 Version Management

Version	Published Date	AlineaSol Reports	Changes
4.x V1	24-3-2014	4.0	First Official User Manual
4.4 V1	16-3-2015	4.4	Main changes: Community • Overwrite formatting type for used fields. • Visibility for pagination buttons. • \${this} is not longer required in a SQL function. • Added minute, hour & quarter hour detail/groupings to reports datetime fields. • When right-clicking a field in edit mode, a hover panel with SQL reference appears. This can be copied to Clipboard. • SQL editor with intelligent highlighting. • Support for export xls, and clean csv and clean xls • Updated Dutch language: thanks to Jason van del Leeuw! • Support for multi-enum and Radio-enum fields. • Support for “Like” and “Not Like” filters for numeric expression. • Support for “starts with” and “ends with” for filtered strings, numeric and enum. Enterprise (includes all Community Features) • Supports PHP post-processing. E.g. New field is the sum of two other calculated fields. • PHP editor with intelligent highlighting.

			• Multi-language support for field labels, enum format type, field user options and labels. • New overwrite formatting types: Button and Enum. • Javascript functions can be defined and executed at report execution. Can be combined with buttons. • In edit mode, now up to 5 link-throughs can be performed. • Filters created in graphic mode can be referenced in SQL mode. • Support for different types of Joins: Left (default), Right and Inner. • Virtual Relations supported between fields • In edit mode, added tree-selector to select fields • Add field in edit mode by clicking on field/link icon • Added possibility (config parameter) for a full Report installation to be "read-only".
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4 Installation

AlineaSol Reports, community edition, can be downloaded at:

<https://www.alineasol.com/en/sugarapps/reports>

Requirements:

- Use MySQL as database
- Requires module: "AlineaSol Common base for 3.X and higher"
 - This module is used by various AlineaSol applications

For enterprise editions you can contact us at: info@alineasol.com

4.1 First time install

Follow the standard way to load a module in SugarCRM:

- First download "AlineaSol Common Base" module to your PC
- Login as a SugarCRM admin user
- Goto "Admin"
- Select "Module Loader"
- Select the module, and upload
- Install the module

Repeat this action for "Asol Reports".

You should have now a new module "Asol_Reports" that you can assign to your users.

4.2 Install new version

Recommended procedure:

- Uninstall older version but **KEEP DATABASE**
- Install new version of module

4.3 Activation

Asol Reports should be ready to run now. If you want to use the schedule reports facility, you will have to add scheduler entries to Sugar.

See Sugar documentation to set this up for your specific Operating System.

For Sugar you will have to add an entry point through sugar admin:

The url to be filled in:

"http://localhost/sugarCRM_dir_in_htdocs/index.php?entryPoint=scheduledTask&module=asol_Reports"

Notes:

1. change in the url above "sugarCRM_dir_in_htdocs" to reflect your own Sugar installation
2. if you are using a hosted set-up (virtual server) you may have to use instead of "localhost" the external address.

Execution should be set to every 5 minutes and every day.

Editar

Guardar Cancelar

Configuración básica

Nombre tarea * AlineaSol Reports Scheduled Estado * Activa

Tarea programada * -- OR http://localhost/cac/index.php?entryPoint=s

Mostrar opciones avanzadas

Cada 5 Intervalo * Minutos

☒ Todos los días	☒ Jueves
☒ Lunes	☒ Viernes
☒ Martes	☒ Sábado
☒ Miércoles	☒ Domingo

Guardar Cancelar

We recommend that you also set-up a Scheduler to clean-up report obsolete files:

Create a new Scheduler that executes the url:

"http://localhost/sugarCRM_dir_in_htdocs/index.php?entryPoint=reportCleanUp&module=asol_Reports".

Note: remember to adapt the URL in line with your installation.

Set the time interval that fits your needs (e.g. once a day).

After installation and configuration, go to the admin section, and execute AlineaSol Reports Validation.

AlineaSol Reports

AlineaSol Reports Configuration Section



AlineaSol Reports Validation

AlineaSol Reports Validation

Check that there is nothing in red. If there are issues, hover over it and the system will provide a suggestion.

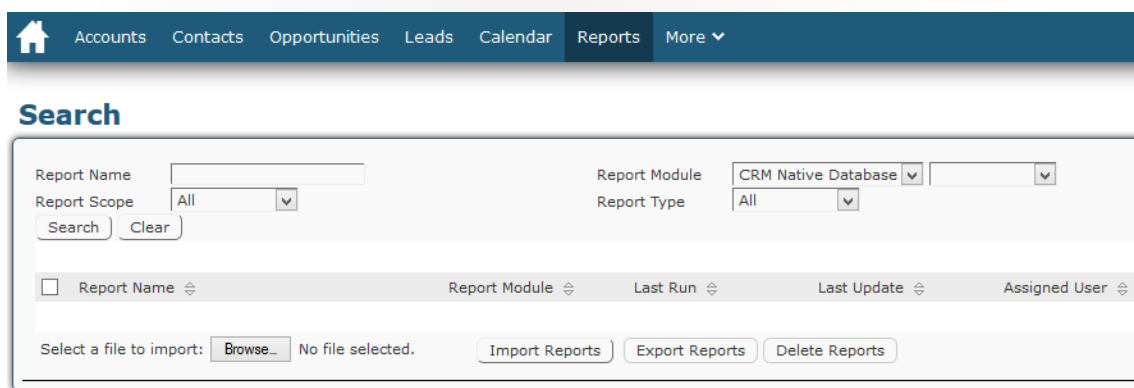
For support reasons, we normally will ask for a screenshot of this.



5 Creating a Report – Table format

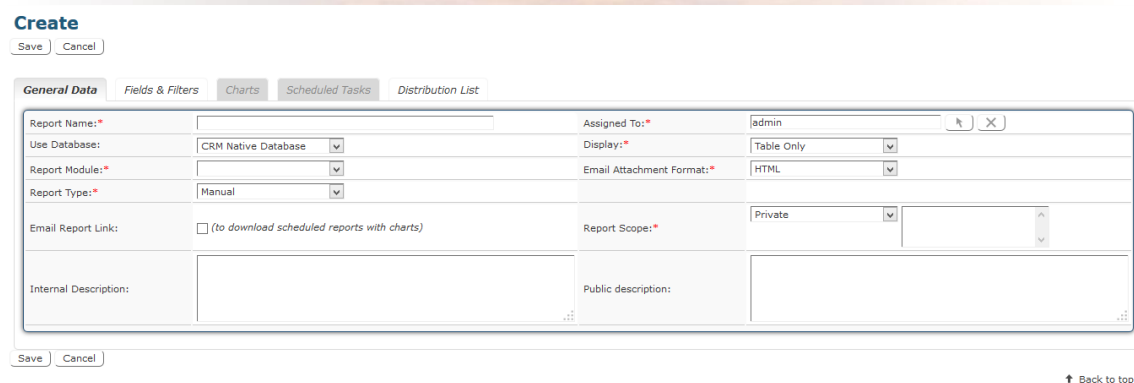
Note: the screenshots show the AlineaSol Blue Theme skin. The Asol Reports version used is the Enterprise version.

Select Reports in the menu (if it does not show, activate this through the admin section). You will see the “list view”, which will be nicely clean after Asol Reports installation.



The screenshot shows the AlineaSol Reports list view. At the top is a navigation bar with links: Accounts, Contacts, Opportunities, Leads, Calendar, Reports (selected), and More. Below the navigation bar is a search section with a search bar and filters for Report Name, Report Scope (All), Report Module (CRM Native Database), and Report Type (All). There are Search and Clear buttons. Below the search section is a table with columns: Report Name, Report Module, Last Run, Last Update, and Assigned User. At the bottom, there is a section for file import with a Browse button, a status 'No file selected.', and buttons for Import Reports, Export Reports, and Delete Reports.

Select Create to go to the “edit view”



The screenshot shows the AlineaSol Reports Create/Edit view. At the top is a 'Create' button and a 'Save' button. Below is a tabbed interface with tabs: General Data (selected), Fields & Filters, Charts, Scheduled Tasks, and Distribution List. The General Data tab contains a form with fields for Report Name, Use Database (CRM Native Database), Report Module, Report Type (Manual), Assigned To (admin), Display (Table Only), Email Attachment Format (HTML), Email Report Link (checkbox), Report Scope (Private), Internal Description, and Public Description. There are Save and Cancel buttons at the bottom. A 'Back to top' link is visible in the bottom right corner.

Note: in the community version all information is in one page.

There are various sections to define your new report.

5.1 General data

In this section you can define the main data for your report.

The main elements that you need to fill in are:

- Report Name: if you plan to create many reports, you may want to define a nomenclature for easy recognition.
- Report Module: this is the main module for your current report. Note that you can create a report also on the audit table of given module by check-marking this option.
- Display: you can select here “table” or “charts” or a combination of these in any order. Charts will not be shown if you only select “table”.

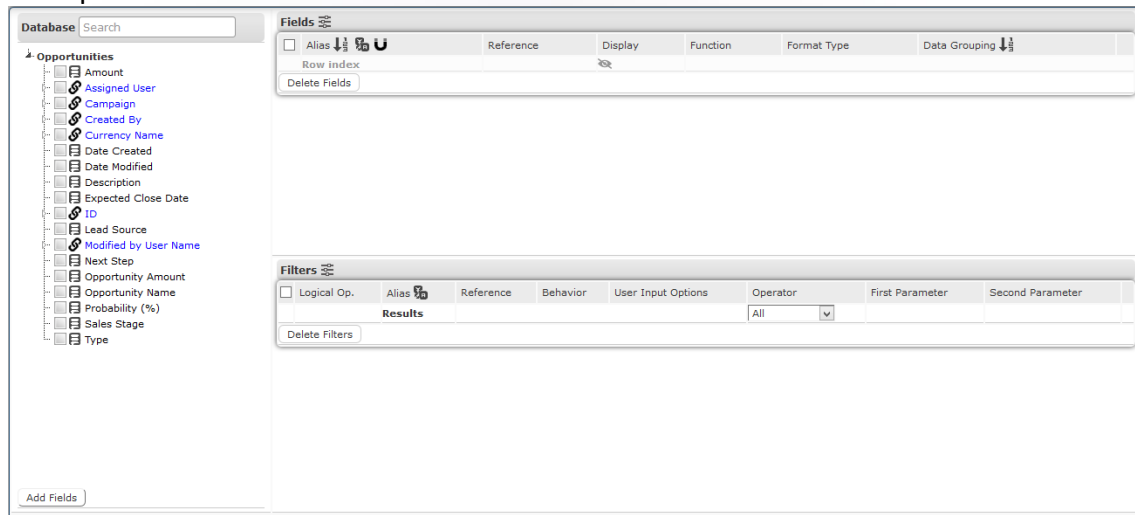
Additional elements:

- User database: in enterprise-version you can select any configured external database besides the “CRM Native Database”.
- Report type:
 - Manual: this is the default. You can execute the report through the CRM to see it.
 - External usage (enterprise): allows external applications to request the output of a specific report.
 - Scheduled: this mode is used for distribution of reports through email. Report is executed and result is sent to the distribution list.
 - Scheduled only: this mode is specifically relevant for heavy reports. It will only execute at given scheduled time. If a user runs the report, he/she will see the results of the report executed at the previously scheduled time. E.g. let’s assume you have millions of sales every day: you can schedule a report to calculate all kinds of interesting data in the middle of the night and then present this as “Yesterdays”-sales. The result report will be presented without having to be re-executed each time.
- Email report link: Scheduled reports that are distributed through email do not include the graphics. If you check this option, a link to the CRM will be included in the email so that the user can click to see the report in all its glory.
- Internal description: these are internal notes that will not be shown when executing the report. You may want to include here specifics on how you have built the report.
- Assigned to: this is the user the report belongs to.
- Email attachment format: This is the report-format that will be included in email distribution lists. Supported:
 - Html
 - Pdf
 - csv and csv clean
 - xls and xls clean
 - Note: the “clean” options are meant to facilitate processing in other apps by deleting mainly empty lines.
- Report scope:
 - Private: only you can see it.

- Public: everyone can see and execute the report. They cannot edit it.
- Role: only given roles can see and execute the report. They can also copy and edit it.
- Public description: this description will be included in the report output. *NOTE: html editor coming soon...*

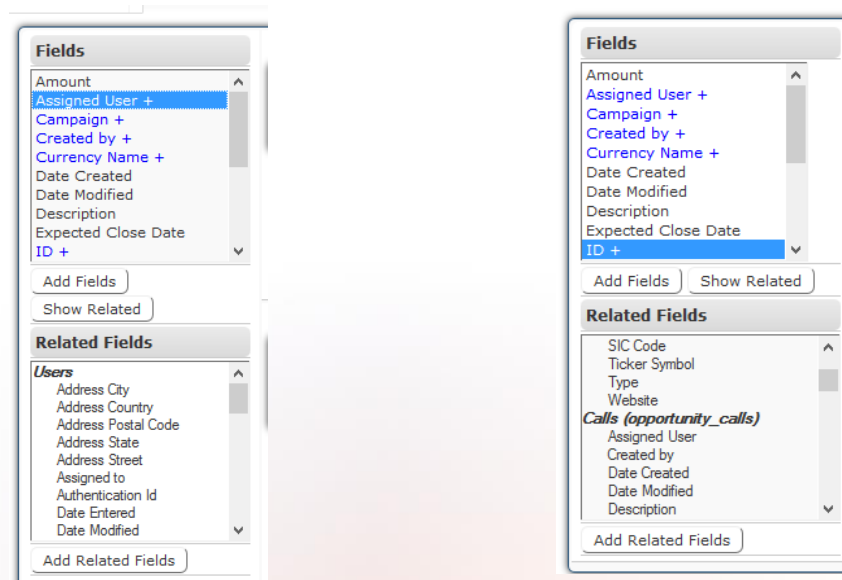
5.2 Fields and Filters

Enterprise view:



After selecting a module, all the fields of that module will be shown in the “Database” area.

- Fields in DB
 - Adding a Field to report:
 - Community
 - Normal (not blue): click on the field, and then on “add fields” to add this field to the report (will appear to the right)
 - Link (blue and “+”): double click on the field. Related fields will appear for that link. The ID + field will allow you to go to all the modules with a relation to the given field. You can also click once, and then click on related. To add the related field, click on “Add related fields”.
 - Note: if you add any user user-link to the report (assigned-user, modified-by, ...), and you add this to a filter, you will be able to also select “My items”. In the case of “User Input” (see further on), the person executing the report will be able to select the user with a select pop-up menu.

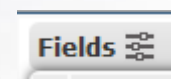


- Enterprise
 - You can directly add a field to the report by clicking on the link/database icon.
 - You can also do a multi-select and then add them to the report by clicking on “Add fields”.
 - You can access related fields by clicking on the “triangle” pointing to the right within the tree. The navigation tree will then expand.

In the Fields section there are quite some icons that offer you special functions. These will be discussed in the various sections.

Note that you can drag&drop the fields to determine the order of presentation: just click on some white space, and carry the row to a different location.

To the right of the “Fields” header you will see an “options” icon.



You can select here if you want to see the Totals and/or subtotals appear as part of the report. Also, you can show if pagination data is shown at the top, bottom or both.

Table Configuration

Visibility

SubTotals:

Visible

Totals:

Visible

Pagination:

All

Save

Cancel

Note: pagination can be disabled for a reports installation. See Read-me doc.

Fields:

Fields

Alias	Reference	Display	Function	Format Type	Data Grouping	
Row index						
Assigned User	assigned_user_id		SQL PHP			
Modified by User Nam	modified_user_id		SQL PHP			

Delete Fields

- Alias: this is the name that will appear in the report to identify the field. By default, the label is copied. You can edit this.
 - Left to the alias you will see various icons.
 - “Order of Orders”.
 - If you select an order for various fields (order icon to the right of the field itself), these fields will appear when you select this option. You can then define the order precedence of the fields with a drag&drop. Eg. First order by A THEN order by B.

Fields Order

Fields Order

Assigned User

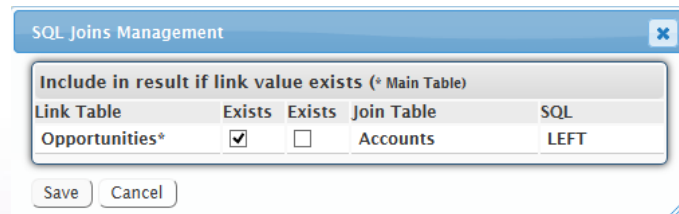
Modified by User Name

Save

Cancel

- The multi-lingual icon allows you to define label reports in the languages defined in the system.
- Join icon: If you include in the report, fields that you have accessed via a relationship, you can define here the type of join. By default, a “left” join will be used, i.e. the field of the “main module” (in the example: “opportunities”)

must exist for an entry in the report to appear. Right Join and Inner Join. For the Inner join, both “Exists” must be selected, i.e. the entries in the report will not have “NULL” values in any of the entries.



- Database icon: If you hover over this icon you will see the internal database name (so that you can differentiate between various fields with the same label, or also useful for advanced functions... more on this later).
- You can sort fields ASC and DESC . Just click on the arrows to the right of the field alias. Arrow down means descending.
 - NOTE: see also “order of orders” icon next to the alias header.
- Row index: in the first line of the fields area you will see this option. If you make it visible, an index column will appear in the report output. Easy for reference, etc.
- Reference: This is used for internal referencing, specifically for PHP functions (see later).
- Display: A black eye means that the field values will be visible. A grey eye with a slash means not visible. Note that sometimes you want to add a field to the report so that you can add filters to it, but you don’t want to see the actual field values... There are many other useful applications for this... e.g. think about copying a “standard” report, and then just changing filters, and fields that you want to show...
- Function: Asol Reports takes into account the type of the field, and depending on its type, it will make certain aggregation functions available.
 - Standard function: When you select an aggregation function, normally one of the fields should be set to “Grouped” . E.g. you could group (see “Group by Layout”) by Opportunity name and then have an aggregated function of “sum” on amount.
 - Advanced functions:
 - If you click on the “SQL” icon, you can add a SQL statement to calculate the value of the field that will be displayed. See also “alias” in filter section.
 - Click on the icon, and a pop-up will appear showing you a subset of MySQL functions available (actually, they are ALL available). NOTE: see admin guide to see how full access to the database can/should be limited (e.g.

statements using "Select"). Admin users should be extremely careful in opening up this access.

Calculated Function for "Opportunity Name" ✕

Save

Clear

Cancel

Flow Control

Arithmetic

Aggregate

Dates

Numeric

String

String 2

Appendix *

Variables

Arithmetic Operators
SQL Arithmetic Operators are used to make arithmetic return a single value.

Operator	Description	Example
+	Addition operator	amount + 2
-	Minus operator	amount - 2
*	Multiplication operator	amount * 2
/	Division operator	amount / 2
%	Modulo operator	amount % 2
DIV	Integer division	amount DIV 2
-	Unary minus. It changes the sign of the argument.	-(amount)

- Note that it is not longer necessary to include `#{this}` (see variable section). E.g. to display 2 times the value of the field, just type: `#{this}*2`.
- When an advanced function is defined, the colour of the SQL icon changes: it becomes blue. See figure below for a typical example (amount multiplied by probability)

Calculated Function for "Weighted Amount" ✕

`#{this}*#{bean->probability}/100`

Save

Clear

Cancel

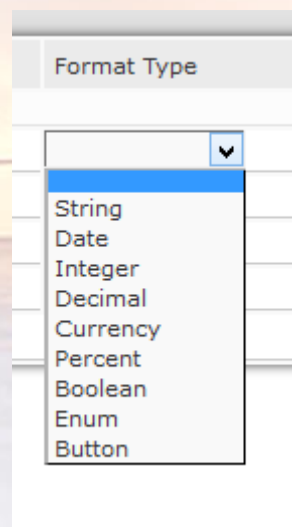
Results					
assigned user id => Users User Name	Opportunity Name	Opportunity Amount	Expected Close Date	Probability (%)	Weighted Amount
admin	Test opportunity	\$1,000.00	31.03.2014	10.00	\$100.00
Totals					
TOTAL					
1					
Refresh Edit Export to HTML Export to PDF Export to CSV Send by Email					

- PHP functions: These can be used to reuse the result-value of a query. The alias of fields can be used in these functions using the following format “#{alias}”. For example:

```

PHP Code
1 [php]
2
3 return ({#{this}/100)*#{amount};
4
5 [/php]
    
```

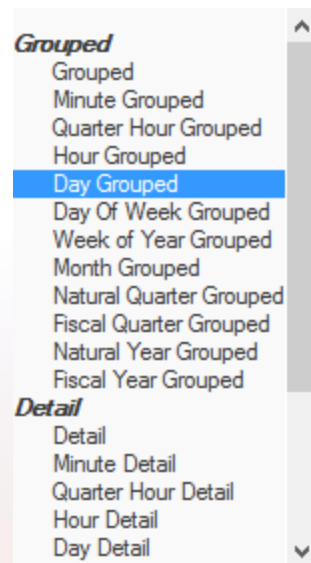
- You can change the format type of a field. The following types are currently supported:



Check section 13 for examples on how to use “Button” (creating a click-through).

- Group by Layout: Depending on the type of field, you will have different options. The basic ones are:
 - Group: this is the basic for aggregate information. E.g. you want to see the maximum amount of all opportunities for each user. You then “group” by User name (assigned to user), and use the “MAX” function on “amount” (opportunities). You will then have one entry for each user showing the maximum opportunity amount for all the opportunities assigned to that user.
 - Detail: this provides a table with all the data for each field value. E.g. you may want to see all open opportunities listed for each user.

- Additional grouping functions are available based on the field type.

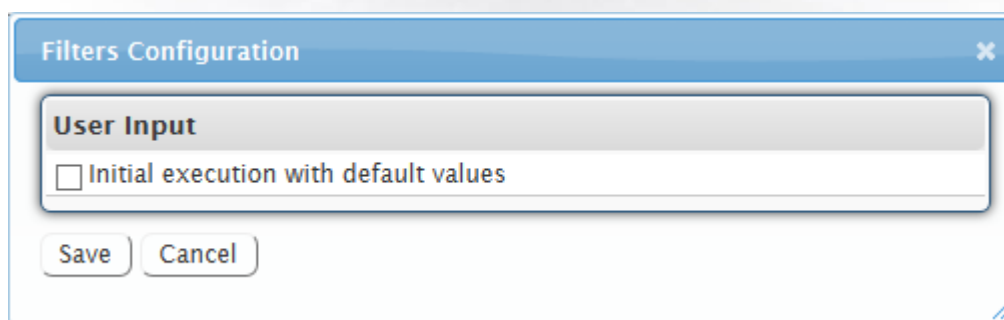


Specifically “date” fields offer quite some options.

- You can determine the grouping order by clicking on the “arrow” icon to the right of the “Group BY Layout” header.
- At the end of the row you will see two icons: “add filter” (“+”) and a bin to delete the field from the report.

Filters: you can define filters to only show those entries that match the filters.

Options: you will see to the right of the “Filters” header an “options” icon. You can set here if the report should be executed automatically when you include user-input type of filters. If you don’t select this, when you run the report the system will prompt you for information and then execute the report. Else, it will use the predefined values and it will display the report automatically.



- The first row in the filter allows you to limit the number of entries to be displayed in the report. Specifically useful for reports like: “top 10”

opportunities. By default, all entries that meet the filter conditions are shown. This can be limited to the first or last n entries.

- Logical operators: you can define complex filter using AND and OR statements. In order to group this appropriately brackets can be used. Admittedly, it was difficult to come up with an ideal look&feel, so finally we settled for the one you see (see figure below)
 - Example: (Amount Not Equal 0 AND Sales Stage = Prospecting) OR (Probability >50% OR amount>500)
 - For the brains: the bracket is set to the left of the field, unless it starts with “..” which means it goes to the right. The Logical operator is set to the right of the field and brackets.
 - Note: if you don’t fill-in anything ANDs are assumed.

The screenshot shows the 'Filters' window in AlineaSol. It contains a table with columns: Logical Op., Alias, Row Reference, Behavior, User Input Options, Operator, First Parameter, and Second Parameter. The table has four rows of filters:

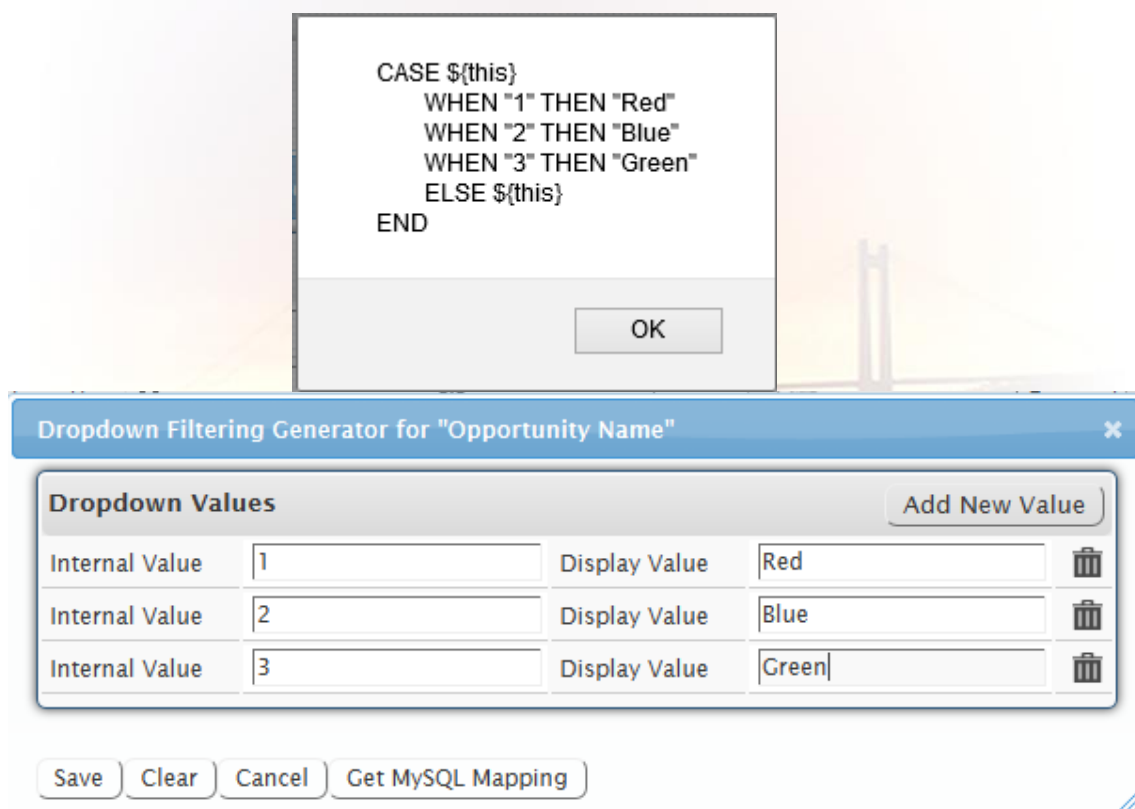
Logical Op.	Alias	Row Reference	Behavior	User Input Options	Operator	First Parameter	Second Parameter
(	Amount	amount_usdolla	Auto		Not Equals	0	
AND							
..)	Sales Stage	sales_stage	Auto		Equals	Prospecting	
(	Probability (%)	probability	Auto		More Than	0,5	
OR							
..)	Amount	amount_usdolla	Auto		More Than	500	

At the bottom left, there is a 'Delete Filters' button.

- Alias: This is the label presented to the user in the case of “User Input” type.
 - Note again the database field icon. You can hover over it to see what the database field is called internally.
- Reference: this is used for external applications and to reuse filters within SQL advanced functions. When external applications call a report, they can include this “row reference” as a parameter to set dynamically filters.
 - This reference can now also be used within SQL advanced functions, by adding #[reference] in the where clause. A new parameter can be injected in the given filter by using the format: #[reference(parameter)] . E.g. “SELECT AVG(OPP0.amount) FROM opportunities OPP0 WHERE #[amount(OPP0.amount)]”
- Behavior: The type has various meanings:
 - Auto: filter is not shown to the user when running the report.
 - Visible: filter is shown to the user when running the report.
 - User input: user is prompted for the value of the filter. See options for filters to determine if the report should be executed automatically at first run or not.
- User input options: this is an interesting piece of code... If you click on the wheel (enterprise version only) you will see a pop-up with a “Add New Value” button. Now, let’s assume that you have in your database a field that can have three values which are internally saved as “1,2,3”, and you have NOT created the corresponding labels in the CRM... You can define the labels here (even multi-language)! Let’s assume that you want to allow the user to filter based on the field, but want to hide the internal coding. This is where you create your “labels”. See next figure. Be aware that this only will be visible to the end-user if you have chosen “User input” or “Visible”.
The pop-up editor will create automatically the user-input-options “1=Red,

2=Blue, 3=Green". This is actually what you would have to fill in the community edition to get the same behavior (*note that currently in the community edition, you have to do a save first before the values are properly handled*).

However, this is only part of the story. If you want not only the filters to appear with the given display values, but also the field descriptions themselves, you have to add the corresponding translation in the advanced function for given field. To make things easier for you, just click on the "Get MySQL Mapping", copy the SQL statement and paste it into your advanced function. Voilà! (see following figure)



- Operator: depending on the type of field, various operators are shown to set-up the filter. Again, special attention to date fields.
 - Date option:
 - Equals, Not Equals, Before and After Date as well as Between, use absolute parameters. E.g. activities on December 25th.

- Last, Not Last, This, Not This, These, Next, Not Next act upon relative parameters: Days(s), Week(s), Month(s), and Natural as well as Fiscal Quarters and Years.
 - “This”, expects a singular parameter: Day, Month.... E.g. This Day(s) means: Today.
 - “Last” looks back, not including current “time element”. E.g. Last Month(s) 1 (note that 1 is the second parameter), means: really last natural month. If you change the second parameter to 2, this would mean, “last 2 months, not including this one!”. E.g. if it is now March, it would apply to Jan and Feb.
 - “These” is the same as “last”, but! It does include this one! These Mont(s) 2, means: current one + last one.
- Parameters: Depending on the operators, one or two parameters need to be filled-in.
- “Bin” icon: delete condition. Note that multiple conditions can be deleted at the same time using the check-fields at the left of the filters.

And at this point you can create interesting reports in tabular form.

5.3 Specials

There are quite a number of options in the Administration guide (now in “readme file) to customize your Asol Reports deployment.

You may want to play around with the CSS (available through configuration option in “Reports”).

We will be introducing templates in the near future so that you can for example show a percentage as a bar instead of a number, or a green check mark when the field value is “true”, etc.

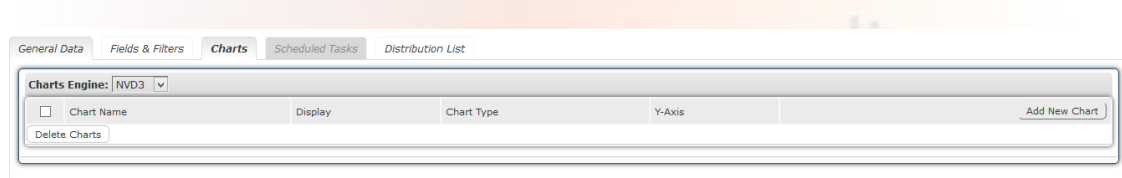
6 Charts

First make sure that you have selected an option including “Charts” in the “Display” option in General Data, or else you will not be able to access the Charts section.

After setting up the basic report as described in chapter 5, we are ready to set-up a chart.

Note that in general you will need to group by some field for Reports to figure out where the X-axis is. Reports supports:

- Detail (e.g. by month)
- Group
- Detail and group: you need this for stacked graphs. The Detail field will be used as X-axis, and the Group field for stacking.
- Group and Group: “same” as “Detail and Group”.



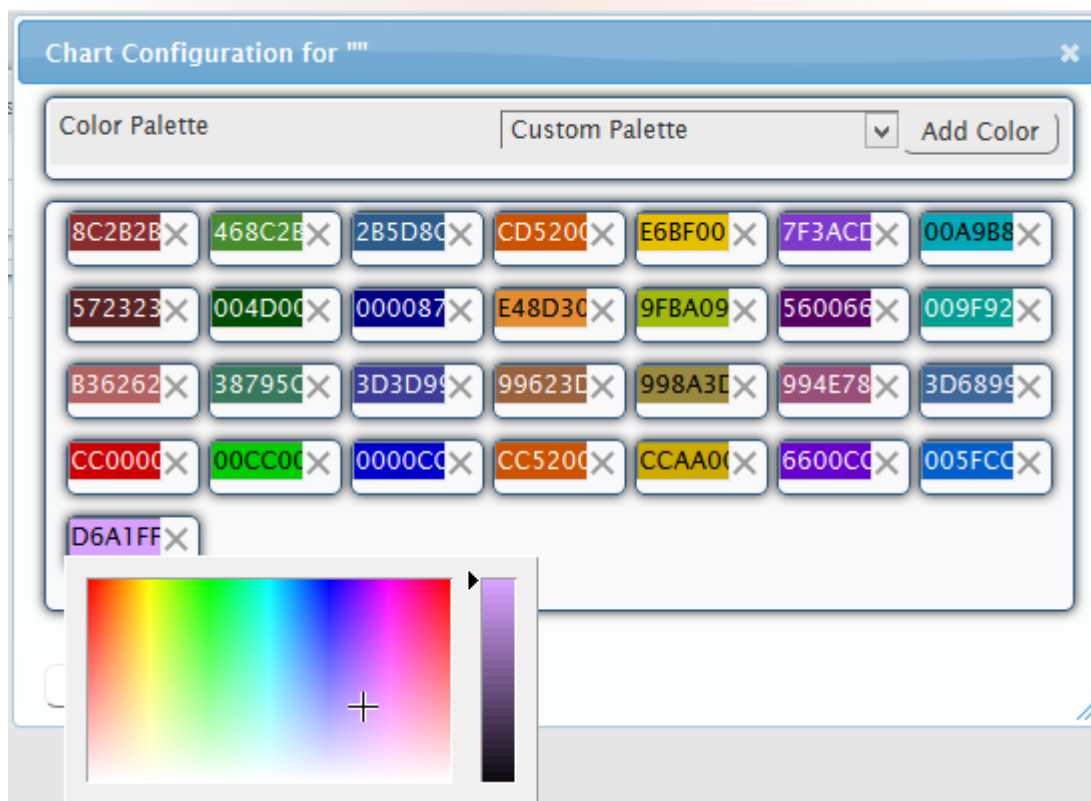
You can select the Charts engine:

- NVD3: this is the default engine. Great interactive library. We have added some enhancements and will continue to evolve this. Largest support of chart-types, and growing. The currently supported graph types:
 - Bar chart
 - Pie Chart
 - Stacked Group
 - Horizontal Group
 - Line
 - Scatter
 - Stacked area
- Html5: standard CRM library
- Flash: standard CRM library

To start the creative journey, click on the “Add New Chart” button on the right.

- Chart name: This is what will be displayed as the chart name of this chart.
- Display: you can show or hide a full graph. A black-eye means it’s visible. Click on the eye to toggle.

- Char type: select one of the available types.
- Y-axis: you will be offered an option to select any of the numerical fields that you have added to “Fields and Filter” section.
- Icons:
 - Add subchart: to add a sub-chart. Currently only supported for “line charts” (in enterprise edition). See next section for more info.
 - “Options”: currently you can define your own color palette (enterprise edition). The default palette is meant for discrete values. *We will be introducing in the near future enhancements to this.* You can customize a palette by adding a color (add color button) and deleting a color (“x” to the right of the color). If you click on the color/coding, you can edit it by entering the corresponding value, or just picking it from the colour&hue picker (i.e. don’t forget about the hue picker: the vertical bar on the right...)
 - “Bin”: delete graph



When you select a chart that supports sub-graphs, you can add multiple sub-graphs to the same graph. Right to the “Y-axis” entry you will see a new icon indicating where the labels for the Y-axis will appear. By default, its to the left, i.e. only one Y-axis. You can toggle this so that you can add a right-hand Y-axis. This is useful when the data you display in the graph and sub-graph are of different magnitude.

General Data

Fields & Filters

Charts

Scheduled Tasks

Distribution List

Charts Engine: NVD3

Chart Name	Display	Chart Type	Y-Axis	
☐ Chart	☒	Line Chart	Opportunity Amount	Add New Chart
		Line Chart	☒	Delete

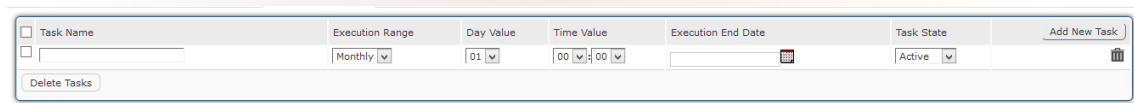


7 Scheduled tasks

First make sure that you have selected an option including “Scheduled” in the “Report type” options in General Data or else you will not be able to access the Scheduled tasks section.

Also, make sure that both scheduling is set at your Operating System level, and that the corresponding Scheduler entries are filled-in in your CRM (see readme/administration guide).

To add a scheduled task, click on “add new task”.



Task Name	Execution Range	Day Value	Time Value	Execution End Date	Task State	Add New Task
☐	Monthly	01	00:00		Active	Add New Task
Delete Tasks						

- Task-name: You can give this any name that may be useful for you.
- Execution Range: with this you can select when the report should be executed. Note that you can add more than one task, e.g. Monday and Wednesday at 8:00. You can select:
 - Monthly: you will have to select then Day and time values
 - Weekly: select day of the week and time value
 - Daily: select time value
- As of the now, you will have to fill-in an “Execution end-date”. After this date, scheduled tasks will not longer apply.
- Task-state: you can deactivate a task
- “Bin” icon: deletion of task.

Note that when you schedule a report you have to define to whom the report should be sent. See next chapter.

8 Distribution list

You can define a distribution list for any type or report. If it's scheduled, the report will be sent to all people in the distribution list automatically. If not, when you run a report, you can use the option "send email" to send them a copy.

The screenshot shows the 'Summary' tab of a configuration window. The title bar includes 'Summary', 'To', 'CC', and 'BCC' tabs. The main content area is titled 'Summary (fill data in other tabs)'. It contains several input fields for configuring a report distribution: 'From:', 'To:', 'Users', 'Roles', 'Distribution List:', 'CC:', 'BCC:', and 'Distribution List:'. Each field has a corresponding dropdown menu for selecting users or roles.

In the summary tab you will see who will get the report (blank in the example). You can click on the to, CC and BCC tabs to add destinations.

The screenshot shows the 'To' tab of the configuration window. The title bar includes 'Summary', 'To', 'CC', and 'BCC' tabs. The main content area is titled 'To'. It contains fields for 'Users', 'Roles', and 'Distribution List:'. The 'Users' field has a dropdown menu showing 'admin'. The 'Roles' field has a dropdown menu showing 'undefined'. The 'Distribution List:' field is empty.

You can add specific users, roles, and plain email ("distribution list" area). In the distribution list area you can add more than one email address separated by a " , " .

Once you select users, the full list will appear in the "summary" tab.

Don't forget to "Save" when you make the changes!

9 List view Report options

In list view, you can find a number of options:

Search

Report Name:
Report Scope:

Report Module: CRM Native Database
Report Type:

Assigned To:

☐	Report Name	Report Module	Last Run	Last Update	Assigned User	Report Scope	Report Type	
☐	Opportunities Closed in Year per salesperson	Opportunities	30.03.2014 17:33	30.03.2014 17:32	admin	Private	Manual	Run Copy Edit Export Delete

Select a file to import: No file selected.

To the right of each report you will find a number of icons (these can be limited due to access settings).

- Run: this will run the report. If it's not "Scheduled only", the report will be executed real-time.
- Copy: to make a copy of a current report. You will go directly into edit mode. The name of the new report will have "Copy of" pre-attached.
- Edit: to edit the report
- Export: individual export option.
- Bin: delete.

Groups-wise, you can:

- Import
- Export
- Delete

10 Running a report

10.1 Basic interaction

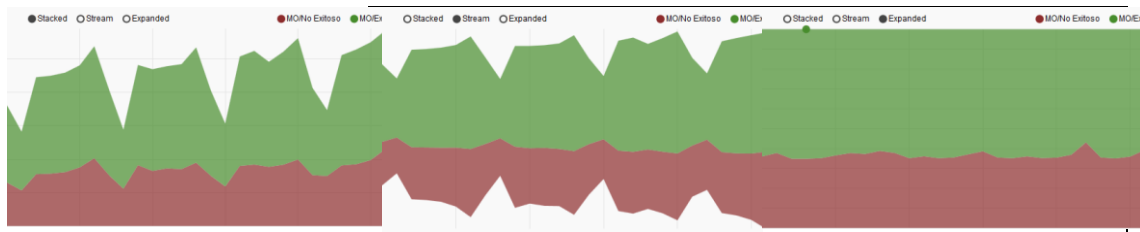
Reports can run automatically in dashlets, initiated from external applications, automatically scheduled or manually by clicking on the report name in list-view (or “run” icon).

If the report is not “Scheduled only”, the report will be executed real-time.

You can see below a number of graphical representations using the NVD3 engine



Another example is shown below with stacked areas. Note that 3 different representations are supported. The right most representation (“Expanded”) show the values normalized to 100%, i.e. you can see percentage wise how the values relate.



With the NVD3 engine, you can have:

- Graph options on the left
- Labels on the right

This depends on the graph-type you are using.

With stacked-charts, you can select and de-select elements from the representation by just clicking once on them. If you double-click, you will see only the representation of that element. Double clicking again will make all elements visible.

10.2 Running a report with user-input filters

In the edit-view, you can define if a user can interactively change the filter values when running the report.

Note that you can also define the report to be executed automatically with the default filter values, and then let the user change the filters (see filter options).

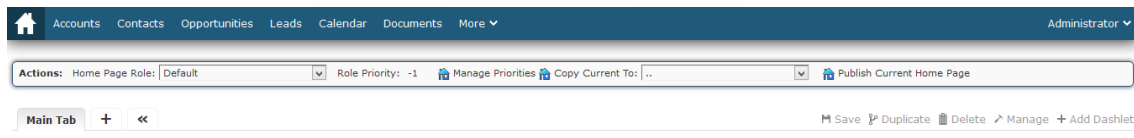
As you can see above, when the report is run, the user is first asked to provide certain inputs. Once the data is filled-in, the user can hit “Execute”.

Note: the Edit button only appears if the user has edit capabilities for the report.

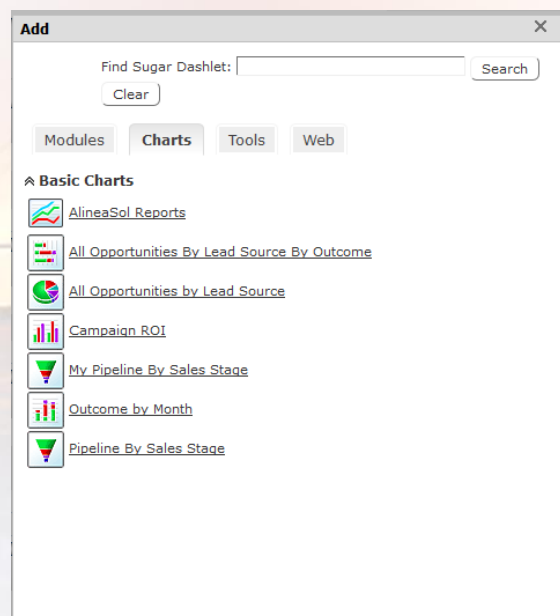
11 Dashlets!

We strongly recommend (not mandatory) to use AlineaSol Publish Home page to enhance your CRM home page with multi-tab option, role control, and many more facilities that you will really need to make those dashing dashboards.

Admin view of home page using “Alineasol Publish Home Page”:



To add a AlineaSol Report dashlet to your home-page, click on “add dashlet” and select AlineaSol Reports.



Follow the standard Dashlet process.

AlineaSol Reports : Options

Report Name:

Report Module: CRM Native Database ▼

Report Scope: All ▼

Search

Title: AlineaSol Reports

Auto-Refresh: Do not auto-refresh ▼

Select Report: Opportunities Closed in Year per salesperson ▲▼

Save Clear

- Report Name: fill-in part of the report name you are looking for and hit search. You can filters reports based on database and scope.
- A list of reports will appear in the bottom area. Select the one you want and fill in the “Title” for the dashlet.

Done!

Note that tabular, graphical, user-inputs, etc. are all supported in dashlets.

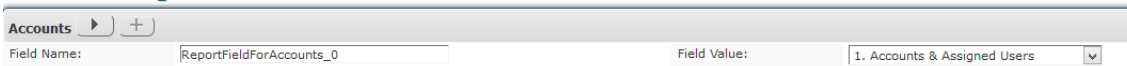
12 Report in standard CRM views

Please note that this process has changed compared to the previous documentation. Although the previous process is still supported, we highly recommend that you use the process described here.

You can add a report field to any view in any module (only enterprise edition).

First: go to admin section, and choose “Fields Management”. You can there define a “Field Name” and associate this with any report (currently drop-down menu). To do so, hit on the “+” icon to add an entry.
Hit on the “play” icon to save.

Fields Management



Field Name	Field Value
ReportFieldForAccounts_0	1. Accounts & Assigned Users

Now, go to “Studio” and you will see the “field name” that you have previously Entered within studio, in the corresponding module.
You can now add this field to any of the views, and the reports will appear.

When the corresponding view is presented, the defined report will be executed. If you have included this in for example “Detail view”, you probably will want to filter based on the ID of e.g. the account. The system will automatically send the ID to the report and will assume that there is a filter with as reference the module name, e.g. “Accounts”.

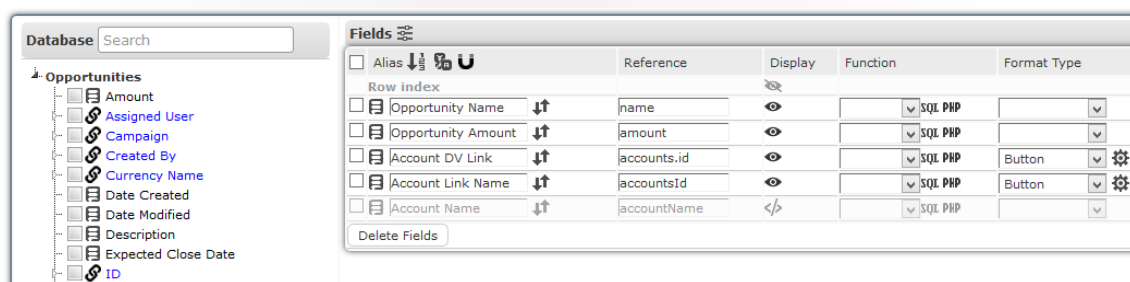
For the names of other modules: just select the module and check in the URL of the browser the module name used.

13 Creating clickable links (only Enterprise).

Alineasol Reports supports currently 2 ways of creating links in a report:

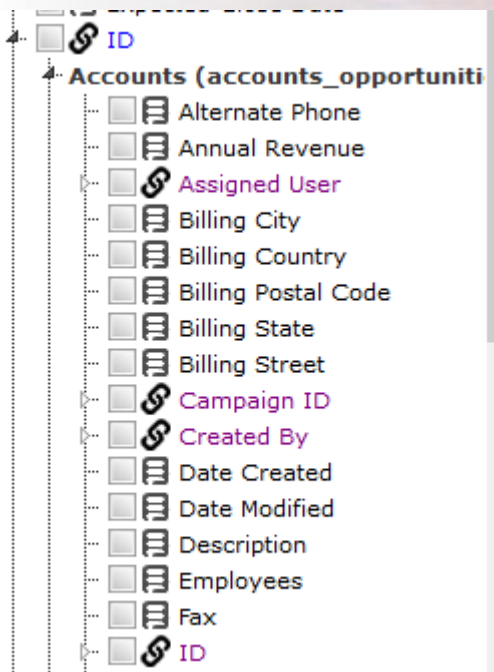
1. Through a clickable extra field/icon
2. By making an existing field clickable

Let's use as an example a report starting from opportunities and with links to the corresponding accounts.



13.1 Extra icon

1. Add the account ID as a field: Open "ID", Open "Accounts", add "ID" within accounts.



Note: if instead of a module with a relationship to accounts, you start directly at accounts, you can choose directly the accounts ID! (first level of the selection tree).

2. Select "Button" as "format" type for this field.

The screenshot shows a configuration bar for a field named 'Account DV Link'. It includes an icon selection button, a text input field containing 'accounts.id', a visibility toggle (eye icon), a dropdown menu set to 'SQL PHP', and a 'Button' format selector with a settings gear icon.

3. Set the properties of the icon as you desire.
 - a. Button type: html link
 - b. Choose the icon that you want to show. Sugar comes with default a set of icons that you can reuse.
 - c. If you don't choose an Icon, you have to define a Button Label. This will be the clickable text.
 - d. Base URL: this is the (relative) URL that will be used to create the link. For Sugar actions, this is always "index.php".
 - e. URL Parameters: you have to add here the parameters that Sugar uses to identify the module, type of action and the actual record. To add a parameter click on "Add New Parameter" (**note: currently this appears in Spanish!)
 - i. Note that you can change the action from EditView to e.g. DetailView, etc. (just look at the Sugar URL bar to see the various options available).
 - ii. Record will be \${this} as it is the actual ID of the account.

The screenshot shows a dialog box titled 'Button Generator for "Account DV Link"'. It contains three main sections:

- Button General Data:** Includes fields for 'Button Type' (set to 'HTML Link'), 'Icon Path' (set to 'themes/default/images/editview.gif'), and 'Button Label' (set to 'Edit').
- Base URL:** A text area containing 'index.php'.
- URL Parameters:** A table with three rows:

Parameter	Value	Action
module	Accounts	[Trash]
action	EditView	[Trash]
record	\${this}	[Trash]

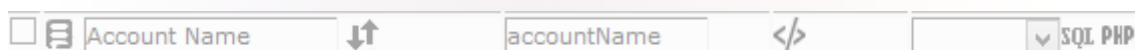
 A button 'Añadir Nuevo Parámetro' is located at the top right of this section.

 At the bottom of the dialog are 'Save', 'Clear', and 'Cancel' buttons.

13.2 Clickable name

Making the name of the account clickable is quite similar.

1. Add the account ID as a field: see above.
2. Add a new field to the report that shows the account Name, and give it an easy reference name, e.g. "accountName". As you need to use this field but you don't want it to appear "double", make it "transparent" (i.e. not visible, nor invisible)



3. Select "Button" as "format" type for the account ID field
4. Set the properties of the ID field as shown below
 - a. Note that instead of adding a fixed label, we are adding now a reference to a field using PHP. The PHP function returns the account name by referencing to the "transparent" field that we added before.
 - b. See here that we have chosen "DetailView" as action.

Button Generator for "Account Link Name" ✕

Button General Data

Button Type	HTML Link ▼		
Icon Path			
Button Label	[php] return '%{accountName}'; [/php]		

Base URL

index.php

URL Parameters Añadir Nuevo Parámetro

Parameter	module	Value	Accounts ✕
Parameter	action	Value	DetailView ✕
Parameter	record	Value	\${this} ✕

Save

Clear

Cancel

14 Configuration

From the main Reports menu you can configure certain elements from the report (see also readme/admin guide for more administration options).

AlineaSol: Configuration

Date Options

Fiscal Year Start Month:* Week starts on:*

Pagination

Entries per Page:*

PDF Options

PDF Orientation:* PDF Image Scaling Factor:*

Scheduled Reports Options

Reports Retention Days:* Host Name:

Reports Style Sheet

Export Original CSS: Export Custom CSS:

Restore Original CSS: Upload Custom CSS: No file selected.

- Date: Defined when the fiscal year starts, as well as first day of the week.
- Pagination: number of entries to appear on one page (pagination can be disabled, but be careful with that...)
- PDF options: landscape or portrait. PDF scaling factor. Default recommended.
- Report Retention days: after which scheduled reports will be cleaned.
- Host name: in principle the right host name will be automatically filled-in.
- Reports Style Sheet: various options to change the default style sheet (strongly improved as of release 4). You can export, modify and import back for your own private delight!